

# Installation/Configuration

## Advanced settings.

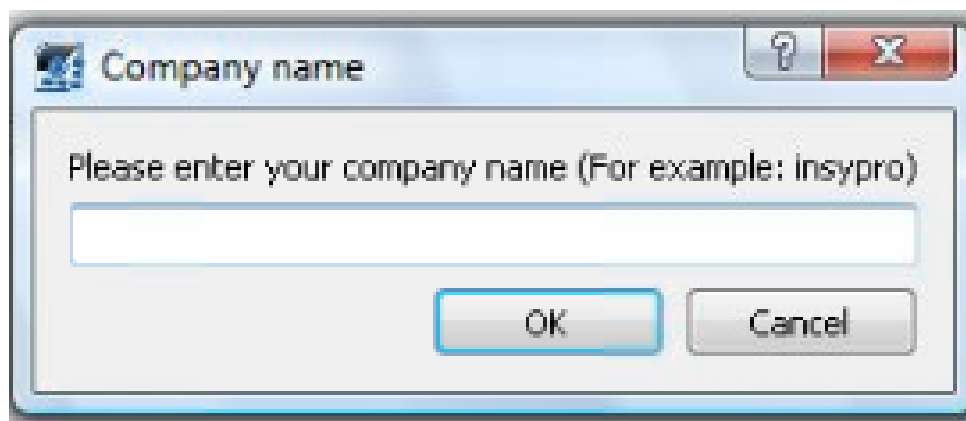
### Introduction

The installation of PlanManager, as described in '**How to install planmanager?**' , will automatically add a number of standard configurations. This document explains what is set and how to adjust these settings. Note: this document is only used for exceptions. The standard installation procedure should normally suffice for most users.

### Method for the first start of PlanManager

#### Enter the company name

When PlanManager is launched for the first time, the program will look in the registry to the key HKEY\_CURRENT\_USER \ Software \ HSS \ Core \ url. If this key does not exist, the program will ask you to enter a company name.



After you enter a company name, the program starts with the default configuration.

### Folder structure

A number of folders are created on the PC. The location of these folders are stored in the register (see below).

Map	Function%
USERPROFILE% \ plan manager \ pictures	When you export pictures, they are placed in this folder.
% USERPROFILE% \ plan manager \ PDF	If you want to print a document, the PDF file is placed in this folder.
% USERPROFILE% \ plan manager \ watch	Audatex writes his sysou files in this folder path. The program looks at the map, as capacity is added a new file the latest file is uploaded to PlanManager.

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## Registry

The following keys are in the registry under the folder HKEY\_CURRENT\_USER \ Software \ HSS \ Core:

Note: The% USERPROFILE% and% APPDATA% are shortcuts that Windows can use to go to a particular folder. The% USERPROFILE% will refer for example to C: \ Users \ Tom. It is that path (for example, C: \ Users \ Tom \ plan manager \ pictures) that you should use in this case.

Key	Default	Meaning
Version	20150219	This is becoming the version number of the Core program stated.
doc_folder%	USERPROFILE% \ plan manager \ pictures	when you export pictures they are placed in this folder.
download_folder%	USERPROFILE% \ plan manager \ PDF	If you want to print a document, the PDF file in this folder.
doc_storage	Temporary	From version 20130723 this configuration is no longer used.
informex_jar_path%	APPDATA% \ Informex \ apps \ launcher \ CurrentVersion \ Winform-Injector.jar	The location of the jar file location which is used by planmanager to inject files in Audatex.
winbooks_path		The folder in which the invoice files WinBooks should be placed.
url	http: //yourcompany.planmanager.insypro.com	yourcompany is the company name that you entered. This URL will be open at startup.
close_callback	http: //yourcompany.planmanager.insypro.com	When the program is closed one last request is send to this page to unblock all open files.
proxy		If you work with a proxy server your insert your proxy as: hostname:8800
Proxy_User		If you use a proxy server which requires registration, you may enter the username,
proxy_pass		And the password of the proxy.
window_title	Plan Manager	The title of the program
watch_folder%	USERPROFILE% \ plan	Audatex writes his sysou

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manager \ watch	files in this folder path. The program looks at the map, as a new file is added the latest file is uploaded to plan manager.
accounting_path	Here, the accounting files are written.
yourcompanyname.user	This will store your username to be able to communicate with Audatex.
yourcompanyname.pass	This password is stored temporarily in order to make communication with Audatex.
length	This temporary stores the language in PlanManager.

## Winformex

Also, important to know is that PlanManager will try to configure Audatex, so it immediately works with PlanManager.

The following files are copied:

From	To%
APPDATA% \ Informex \ apps \ W2-PROD \ current \ Winform	Injector.jar%APPDATA% \ Informex \ apps \ Launcher \ current \ Winform \ Injector.jar%
APPDATA% \ Informex \ Winform \ conf \ sysou-copy-save-directory	single.xml%APPDATA% \ Informex \ Winform \ conf \ sysou-copy-save-directory
single.xml.old%APPDATA% \ Informex \ Winform \ conf \ sysou-copy-save-directory	multi.xml%APPDATA% \ Informex \ Winform \ conf \ sysou-copy-save-directory multi.xml.old

The location of the Winform Injector file is stored in the setting informex\_jar\_path.

The files sysou-copy-save-directory multi.xml and sysou-copy-save-directory single.xml are used by Audatex to store the files.

This setting watch\_folder, which state, will therefore be entered in the register files sysou-copy-save-directory multi.xml and sysou-copy-save-directory single.xml. If

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you change the Audatex setting itself, keep in mind that even the registry setting watch\_folder must be adjusted.

## Proxy

If you are using a proxy server in your company, you must manually register the setting proxy entering the form hostname: 8080.

## Remote Desktop / Terminal Server / Citrix

Remember that PlanManager writes settings under HKEY\_CURRENT\_USER. If you have multiple users working on the same server then each user will be configured.

Note: because the Audatex configuration is stored globally for all users in the file 'sysou-copy-save-directory multi.xml' you can define only one folder to use. However, this creates another problem. Take the following use case:

Winformex sysou-copy-save directory and plan manager watch\_folder are both set to C: \ watch.

Three users Tom, Dick, George and Corneel. They all have their open PlanManager.

John has just made a Winformex estimation and allows transmission to Informex.

Winformex sysou writes the file path C: \ Watch

The PlanManager of John sees the change of the directory and sends the sysou file.

But the PlanManagers of Peter George and Corneel see the change and send the same file.

The file is thus three times sent to the server.

But here's a simple solution:

Configure watch\_folder and sysou-copy-save directory as H: \ plan manager \ watch where H: is a network that is unique for each user. A good example is the HOME directory on many terminal servers. Each user has an H but can only see their own files.

For Informex seems as if all the files can be written to the same folder. But the PlanManager of John only sees his own sysou files and not from Peter George or Corneel.

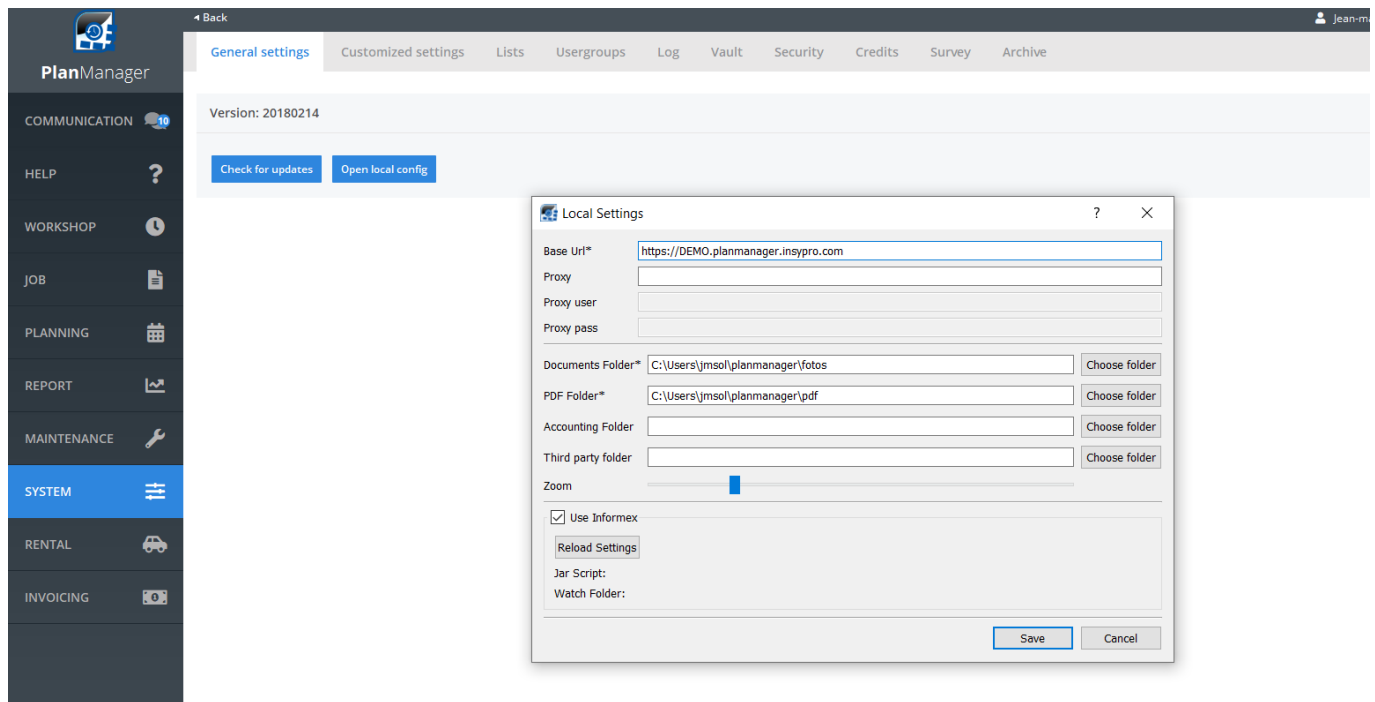
## Automatically sign

You can set PlanManager so that you are automatically logged. This can be useful for instance for ATR users.

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Here's how:

Go to System -> Local Settings -> Open local configuration



Enter the Base URL existing with:

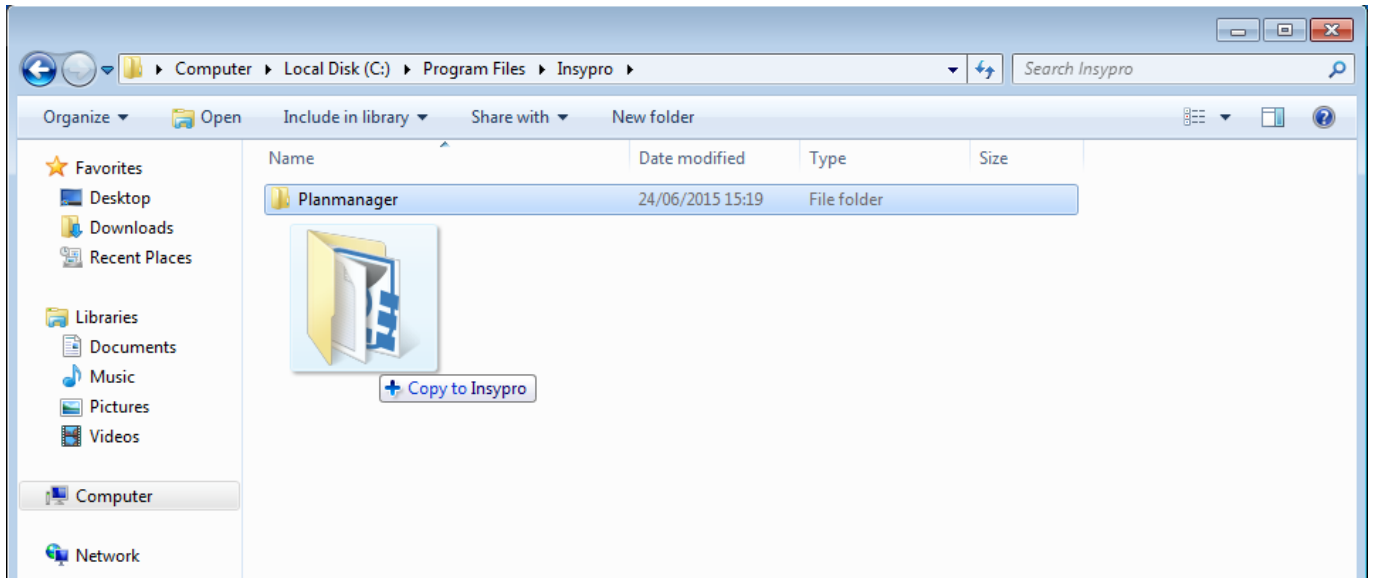
http://companyname.planmanager.insypro.com/index.php?pass=je & user password = your username

Then press Save.

## Installing Multiple PlanManagers

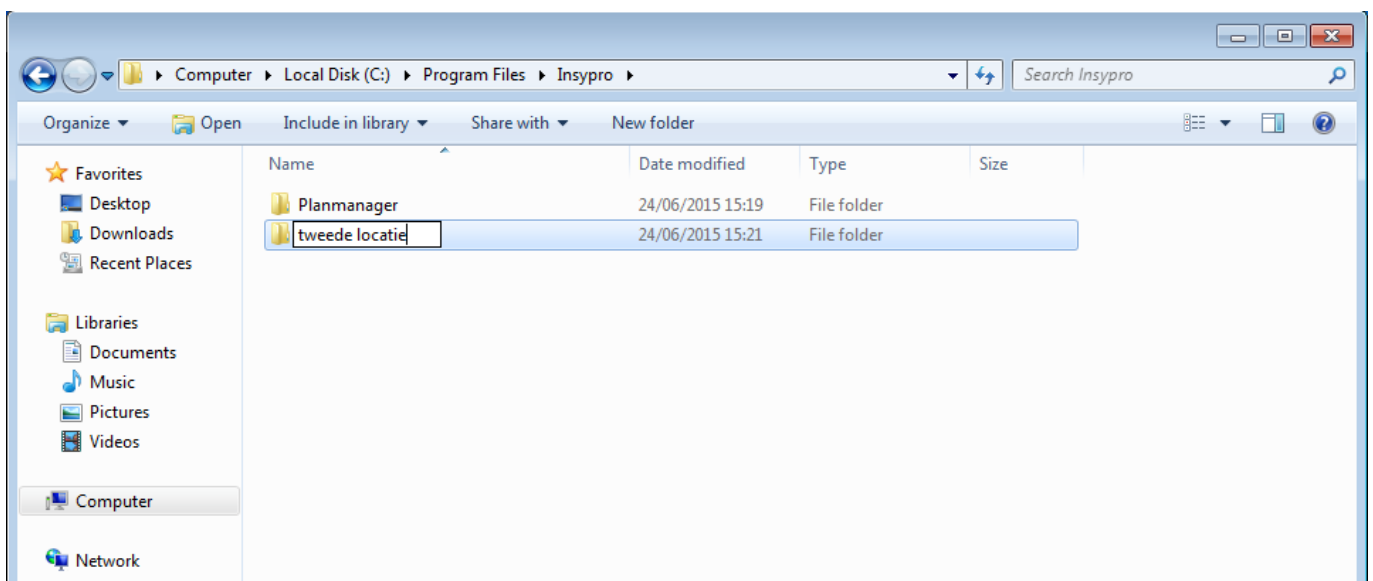
If you need to work with multiple PlanManagers, for example, your own business, but also have to access the PlanManager of another company because you do repairs for them, then you can work in the following manner to use multiple PlanManagers.

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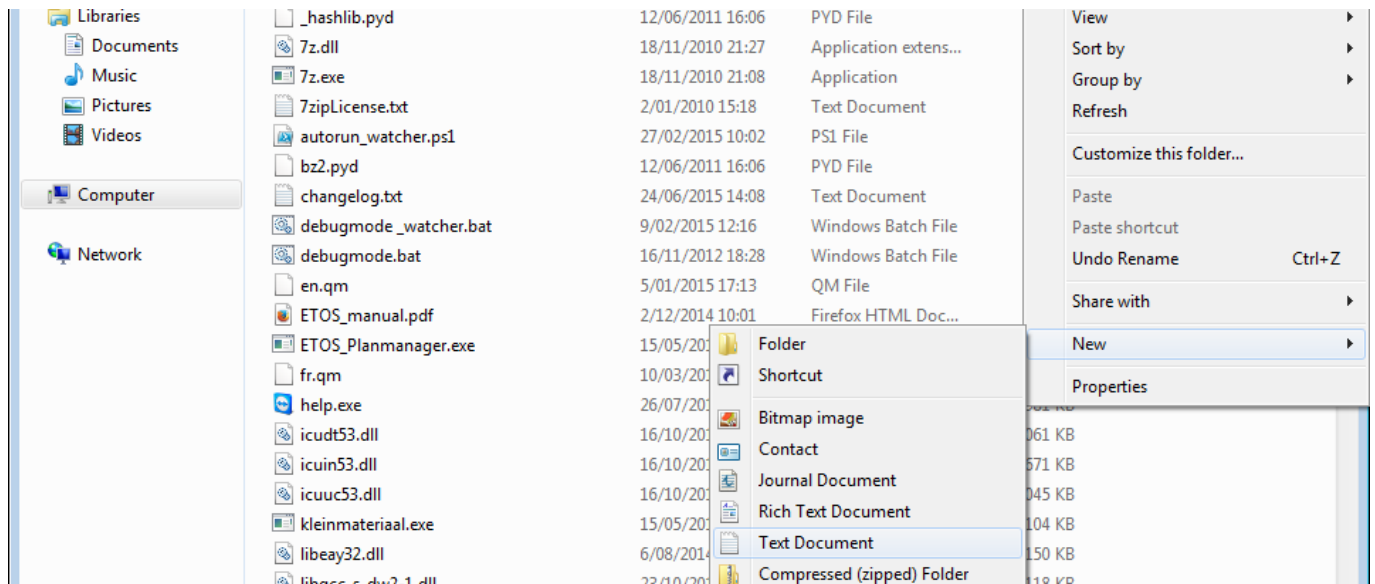
After installing Schedule Manager, you can go to the location on your computer where you have installed it.

By default this is C: \ Program Files (x86) \ Insypro or C: \ Program Files \ Insypro. Here you will see a folder PlanManager. If you drag the folder with Ctrl you can create a copy of this folder to the same location.

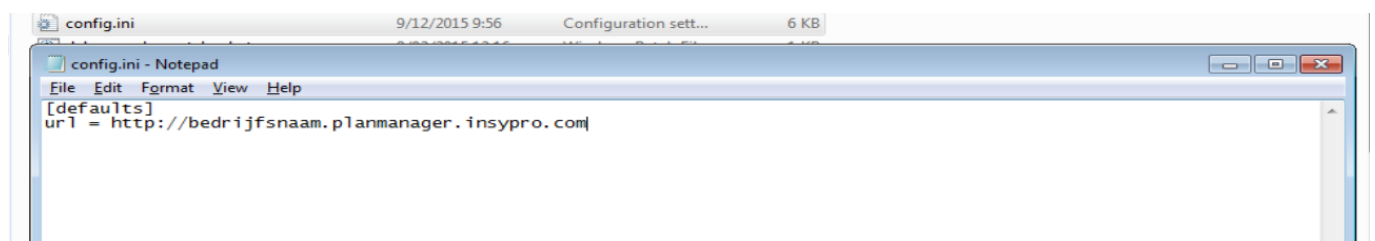


You can rename the folder to the second company.

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In both of these directories, you must create a config.ini file by clicking the right mouse button and then new - to select text file. The file is then created 'file.txt' to rename 'config.ini'. NOTE: Windows hides file extensions by default so you can not see the .txt and if you rename the file, the file names actually config.ini.txt. You will have to display file extensions for that folder to get back off the .txt.



The text in this section can then be changed. It starts with [defaults] followed by all the settings you need for this PlanManager. All settings can be found here above in the "Register" section. You can fill it here as follows: "key = value". For example, "url = http: //yourcompany.planmanager.insypro.com '.

If you want to update PlanManager's installation to the latest version, after the update, you will need to copy all files except the config.ini contained in the PlanManager folder that we copied to the new folder.

Unique solution ID: #1502

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